



Driving digital impact

futureproof your brokerage with impactful digital tips and hints

Broker Webinar

Be open, act responsibly, keep it simple, put people first and make things better

Key Learnings

Research Topics

Researching these important topics will help you establish lessons in the findings:

Fundamentals

- E-sign
- Social media
- Online quotes
- Texting
- Automated email/text

Modernisations

- Email marketing
- SEO
- Video calls
- Self-serve portal
- Live online chat

Innovations

- Paid social ads
- Marketing analytics
- Video quotes
- Google Adwords
- Chatbot/AI

Tips for Getting Reviews

You may have noticed that a lot of brokers use a review tool, such as Trustpilot, which is great for gathering reviews. When looking for reviews for your brokerage, consider:

- Asking those who have used your services. According to a BrightLocal survey, 68% of customers left a local business review when asked.
- Making it easy for a customer to leave a review. Point to review sites, such as Trustpilot, on your website.
- Making sure you've links/icons directing customers to the places they can leave a review - Yelp, Google, Facebook, etc., on your website.
- **Remember:** When you receive a glowing review, share it on social media. Doing so will provide proof of your standards and reliability to potential customers.

Other Social Media Opportunities

It's important to remember that not all of your social media posts need to be about insurance. For instance, you can:

- Post about an event (sponsorship) or occasion (St. Patrick's Day).
- Highlight staff members.
- Feature topical content.
- Share passions and, if you're not too camera shy, videos.

Useful Resources

Applied Systems

- **Applied Systems:** <https://www1.appliedsystems.com/en-ie/solutions/for-brokers/mobile/applied-csr24/>
- **Applied Partner Programme:** <https://www1.appliedsystems.com/en-ie/about-us/partner-programme/>

Marketing Automation

- **Circulator:** <https://www.circulatorinsurance.com/>
- **Mailchimp:** <https://mailchimp.com/?currency=EUR>

Vendors/Services

- **Trustpilot:** <https://ie.trustpilot.com/>
- **Survey Monkey:** <https://www.surveymonkey.com/>
- **DocuSign:** <https://go.docusign.com/partners/contact/appliedsystems/>

Google

- **Analytics Marketing Kit:** marketingkit.withgoogle.com

Video Proposals

- **Loom:** <https://www.loom.com/screen-recorder>
- **Vidyard:** <https://www.vidyard.com/>
- **ScreenPal:** <https://screenpal.com/>

Marketing Materials

- **Canva:** <https://www.canva.com/>

Brokers Ireland: <https://brokersireland.ie/benefits-of-membership/>

**Thank you for attending our
Driving Digital Impact webinar**